



DWSD Benchmark Poll April 2019



DWSD BENCHMARK POLL

Between April 18th and April 29th Compass Strategies conducted 419 CATI surveys on behalf of Detroit Water and Sewage Department. This presentation is a summary of those results.

For the purposes of this presentation, General Population refers to DWSD customers who are responsible for managing their household's DWSD account.

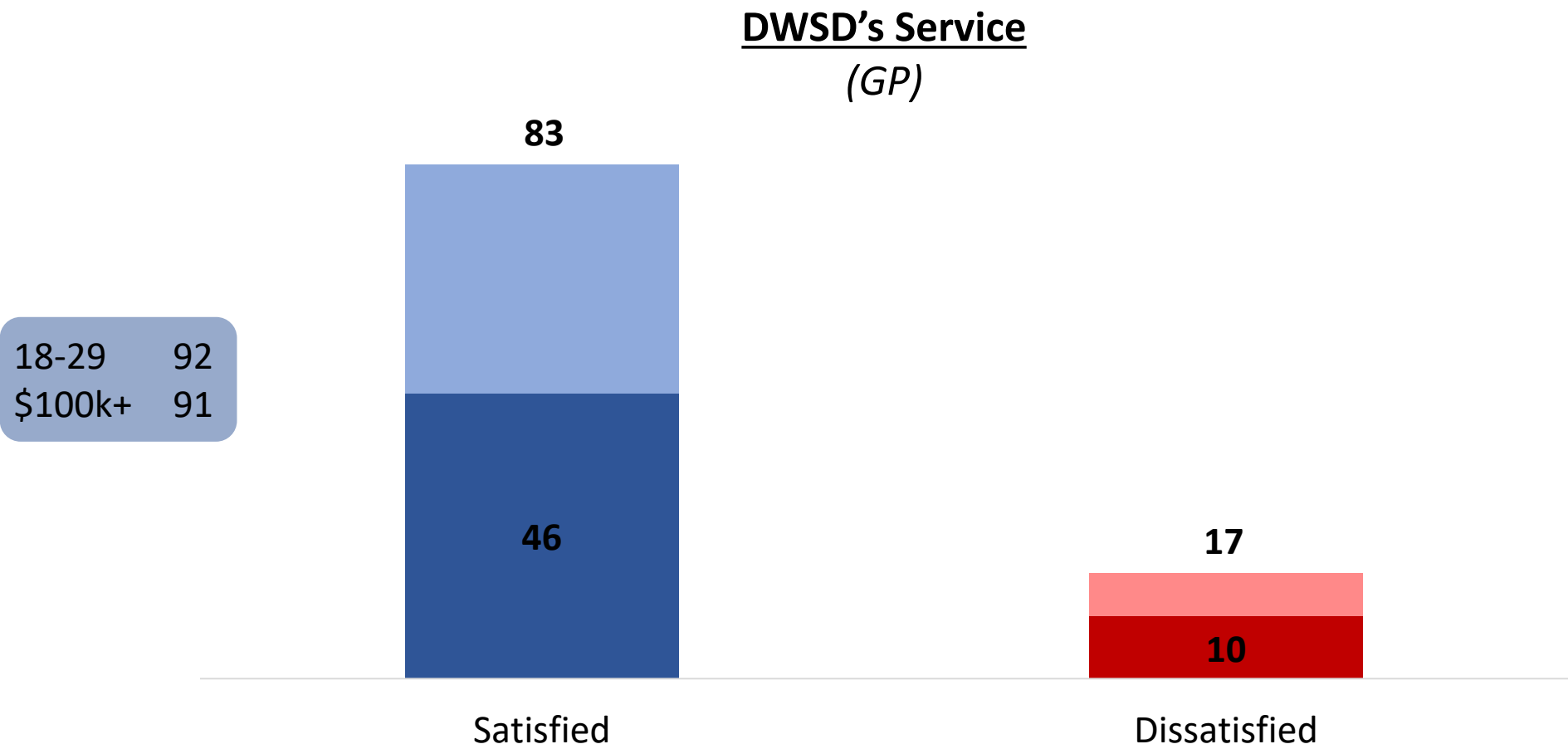
The margin of error for this poll is $\pm 4.79\%$ for General Population, and higher for subgroups. No weights were applied to the results. Findings are rounded to the nearest percentage.

An aerial photograph of a city at dusk. In the foreground, there are several large, multi-story residential houses with dark roofs and brick walls, surrounded by green trees. In the background, a dense city skyline is visible, featuring various skyscrapers and buildings, some of which are illuminated with warm lights. The sky is a mix of orange and grey, suggesting the time is either sunset or sunrise. A large, white, curved structure, possibly a stadium or arena, is visible on the left side of the image. The text "CUSTOMER SERVICE" is overlaid in the center in a large, white, sans-serif font. A thin white vertical line is positioned to the left of the text.

CUSTOMER SERVICE

OVERALL, THERE IS HIGH SATISFACTION WITH DWSD'S SERVICE

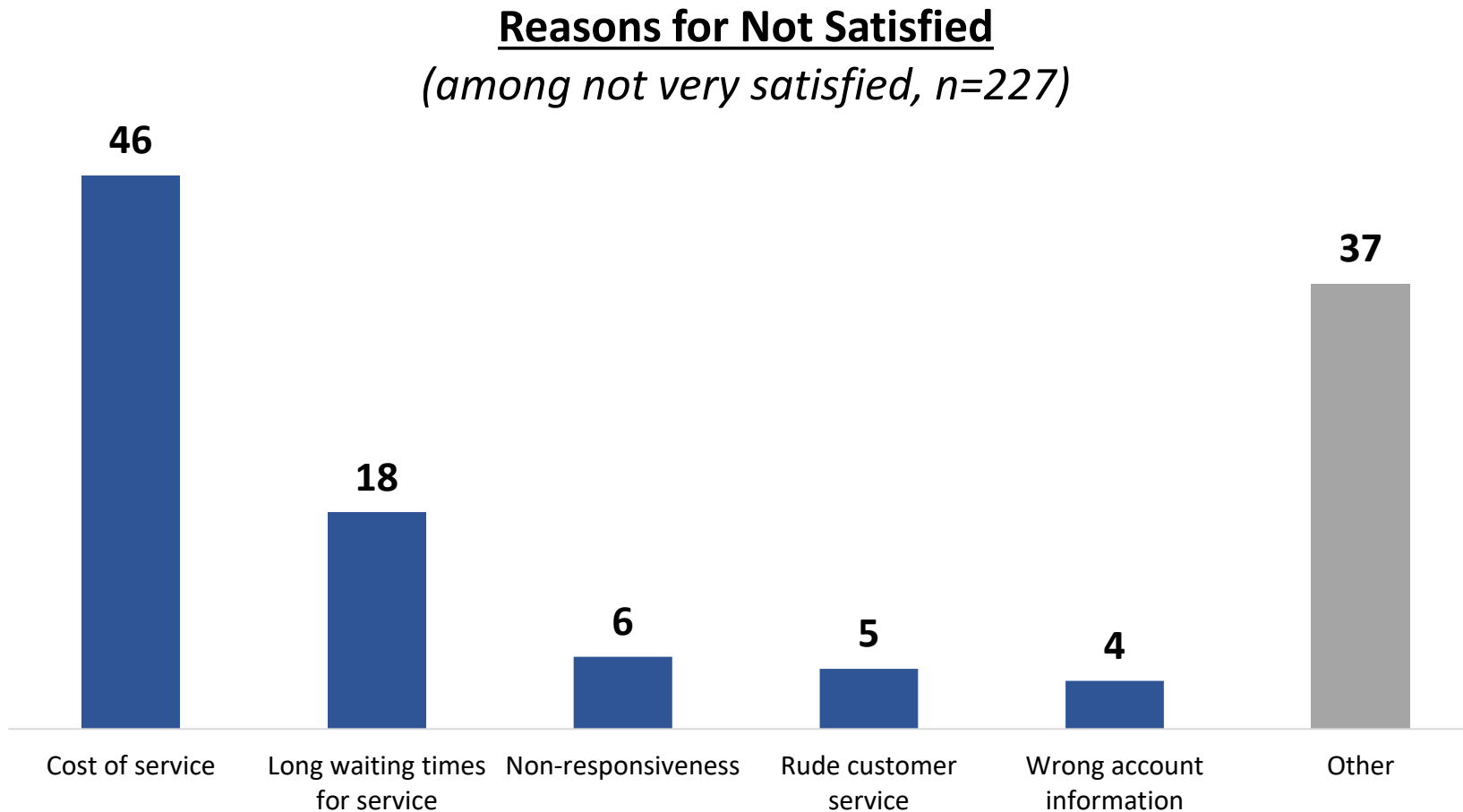
4 out of 5 respondents are satisfied with DWSD's current service, and nearly half say they are *very* satisfied. Satisfaction is especially higher among young and high income customers.



Q3: Overall, how satisfied would you say you are with DWSD's service?

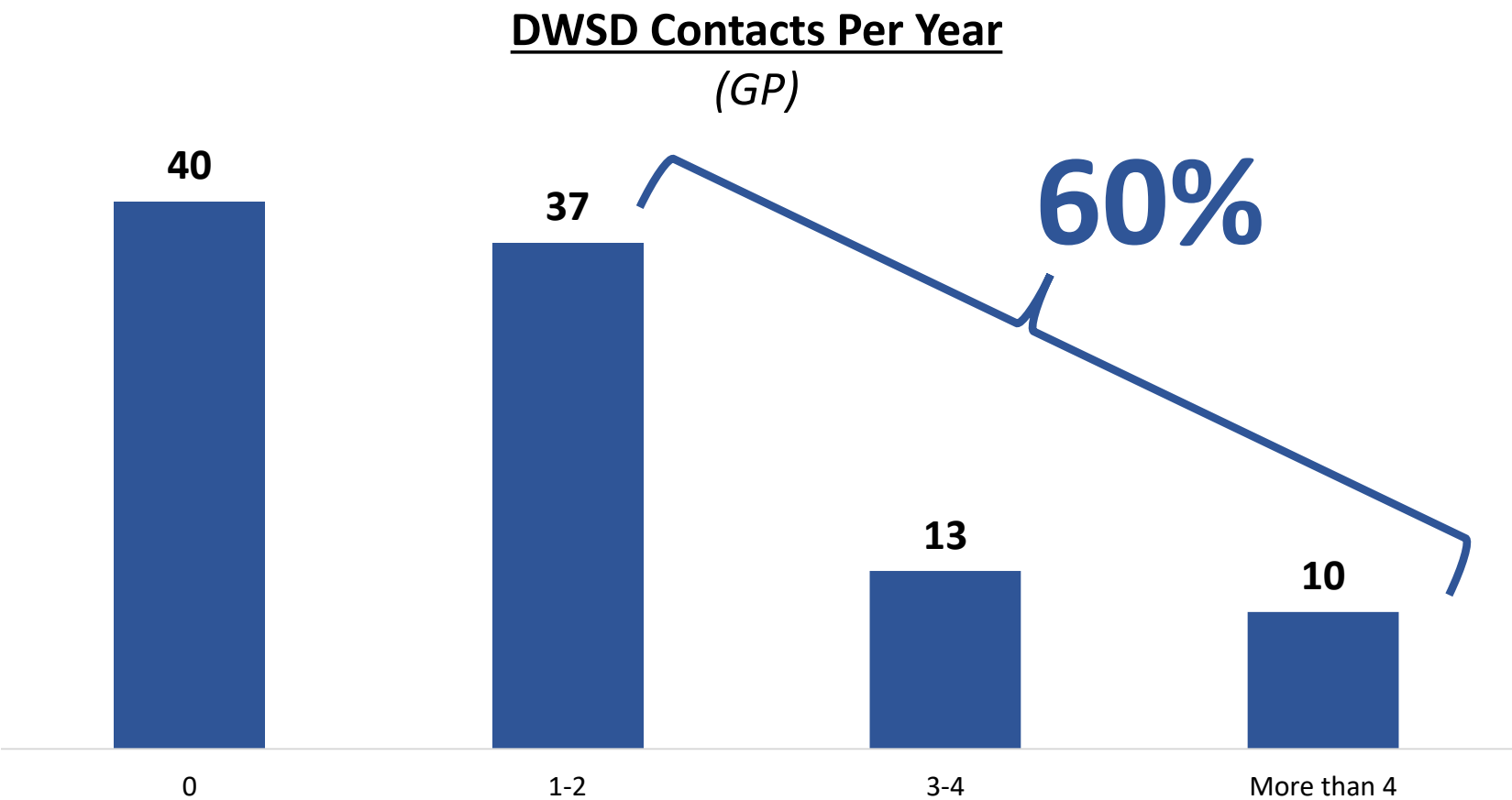
MAIN REASON FOR DISSATISFACTION IS FAR AND AWAY COST OF SERVICE

A large number of customers do not feel that they are dissatisfied for any of the reasons we had proposed.



THREE OUT OF FIVE CUSTOMERS CONTACT DWSD ON AN ANNUAL BASIS

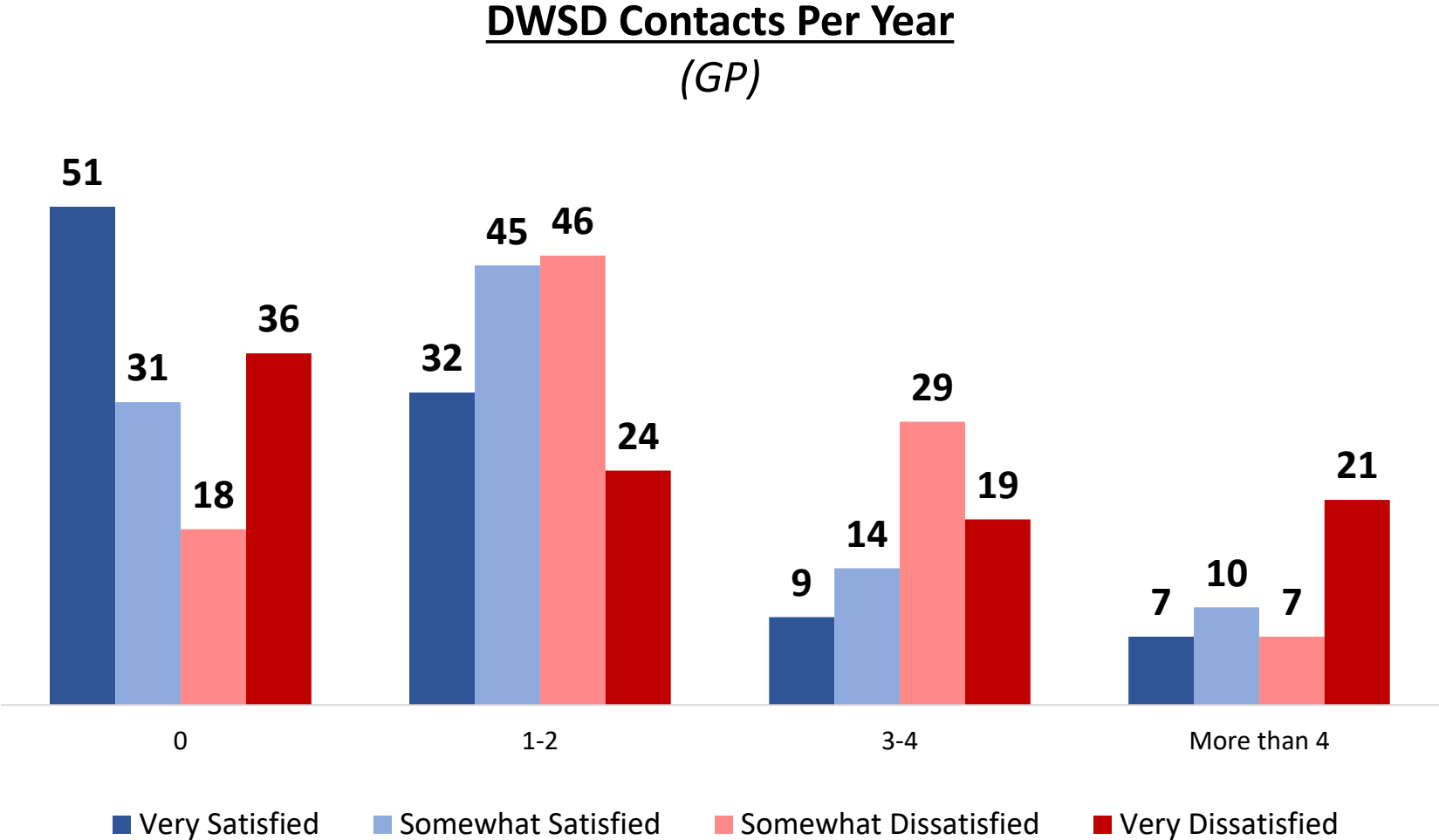
Two thirds of customers who contact DWSD only do some 1-2 times per year. Two in five customers do not contact DWSD at all.



Q5: How often do you contact DWSD on a yearly basis?

THERE IS AN INVERSE CORRELATION BETWEEN SATISFACTION AND ANNUAL CONTACTS

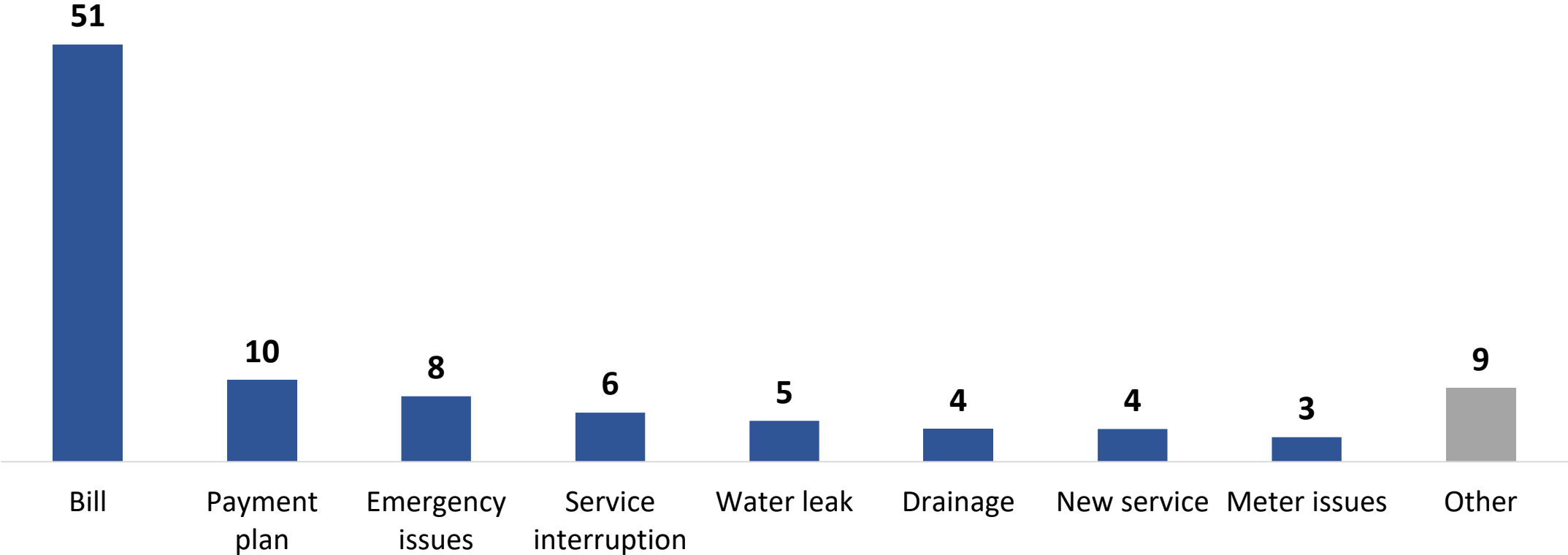
Unsurprisingly, there is almost a direct inverse correlation between how satisfied a customer is and annual contacts – customers who are very satisfied tend to not call DWSD, somewhat satisfied 1-2 times, somewhat dissatisfied 3-4 times and very dissatisfied more than 4 times.



THE NUMBER ONE REASON FOR CONTACTS IS REGARDING BILLS

Billing accounts for half of all annual DWSD contacts.

Reasons for Contact
(among annual contacts >1, n=252)

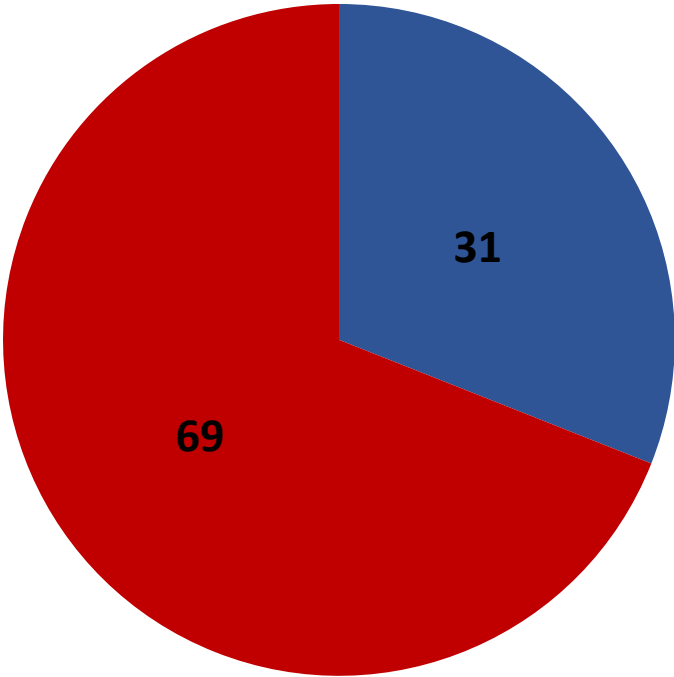


ONE IN FIVE CUSTOMERS CONTACTED DWSD IN THE LAST 90 DAYS

Of all DWSD customer contacts in the last year, a third of them contacted in the last 90 days. This number is particularly higher among dissatisfied customer – where it is double among very dissatisfied customers.

Contacted DWSD in Last 90 Days
(among contacted in last year, n=252)

Overall contacted
in last 90 days:
19%



Very dissatisfied 59
Somewhat dissatisfied 43

■ Yes ■ No



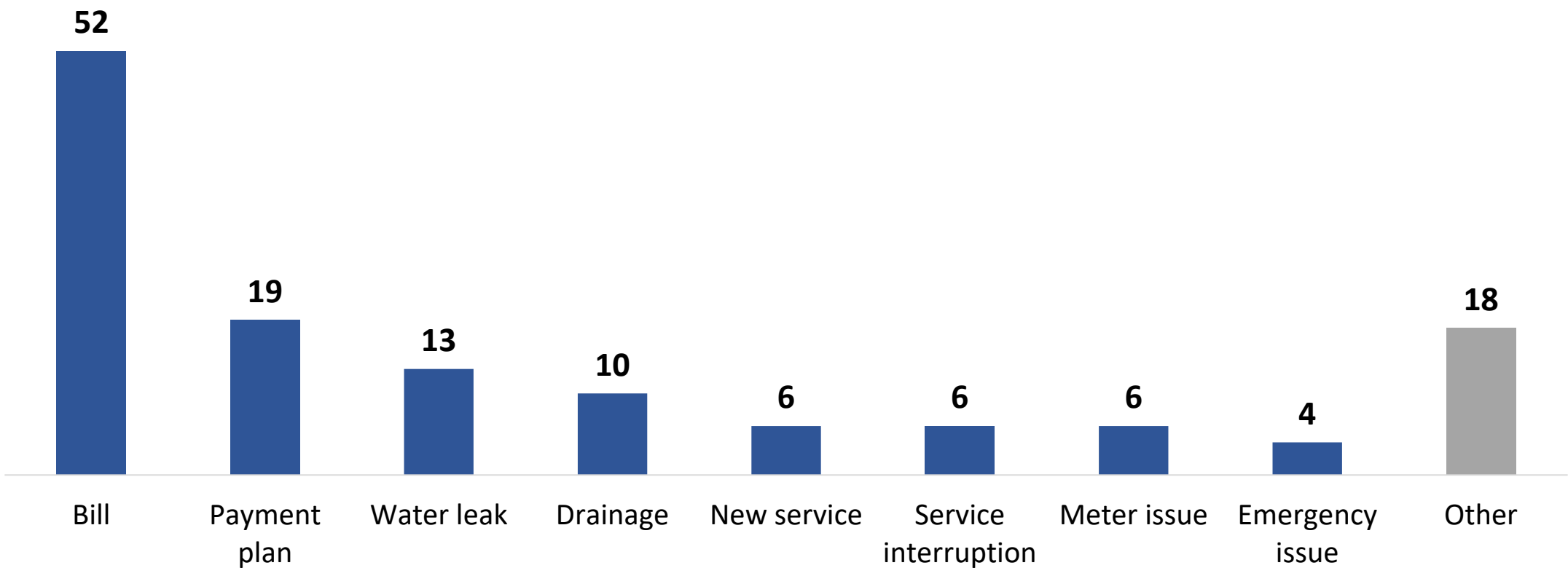
Q7: Have you contacted DWSD for an issue in the last 90 days?

CONTACTS IN THE LAST 90 DAYS REFLECT THE SAME ISSUES AS THE PAST YEAR

Over the past 90 days, billing accounts for over 50% of all reasons for contacting DWSD.

Reasons for Contact

(among contacts in last 90 days, n=79)

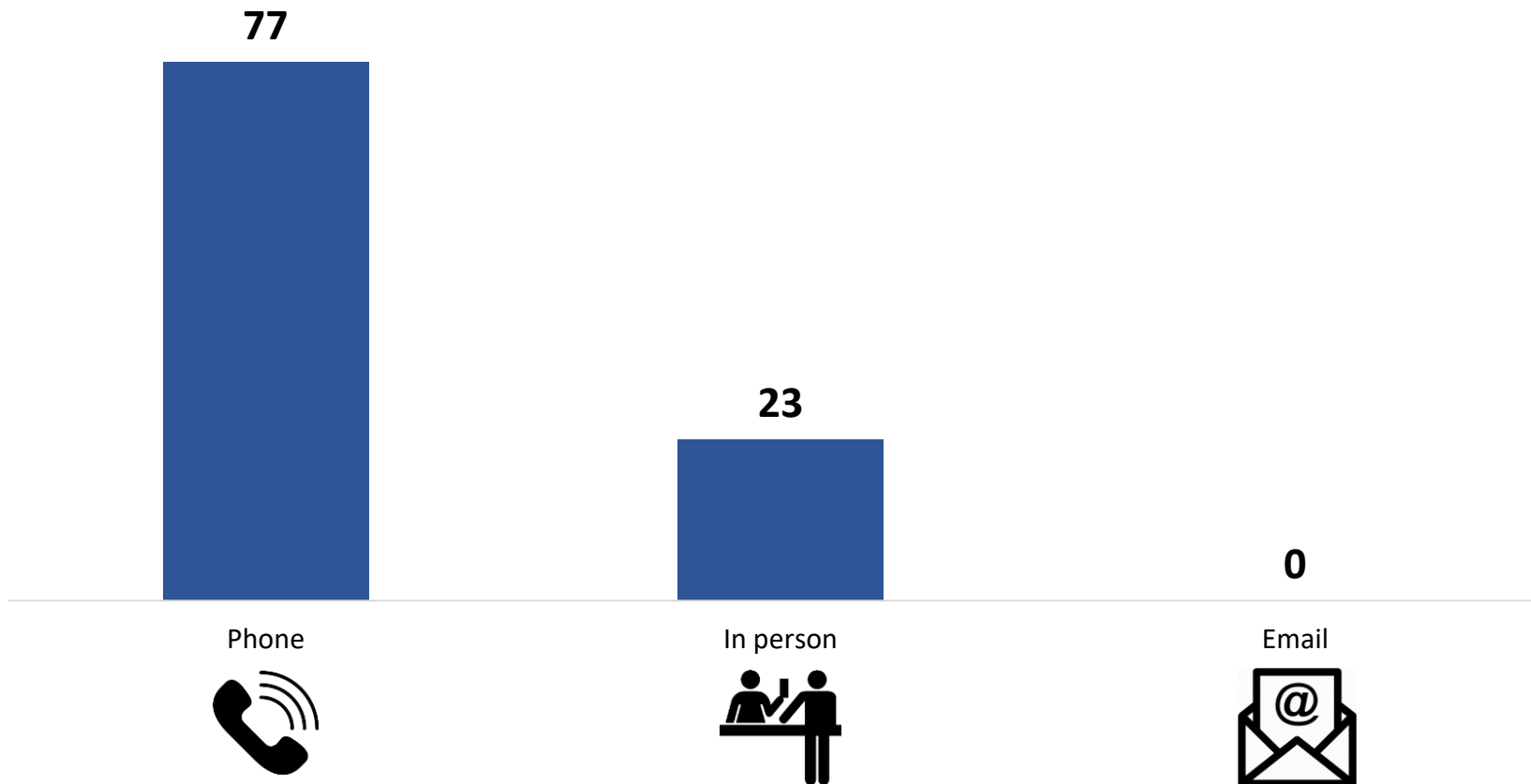


TELEPHONE IS THE MOST COMMON WAY TO CONTACT DWSD

Three quarters of contacts by customers in the last 90 days came over the telephone. The remaining quarter of customers contacted DWSD in person. The number of customers who email DWSD is close to zero.

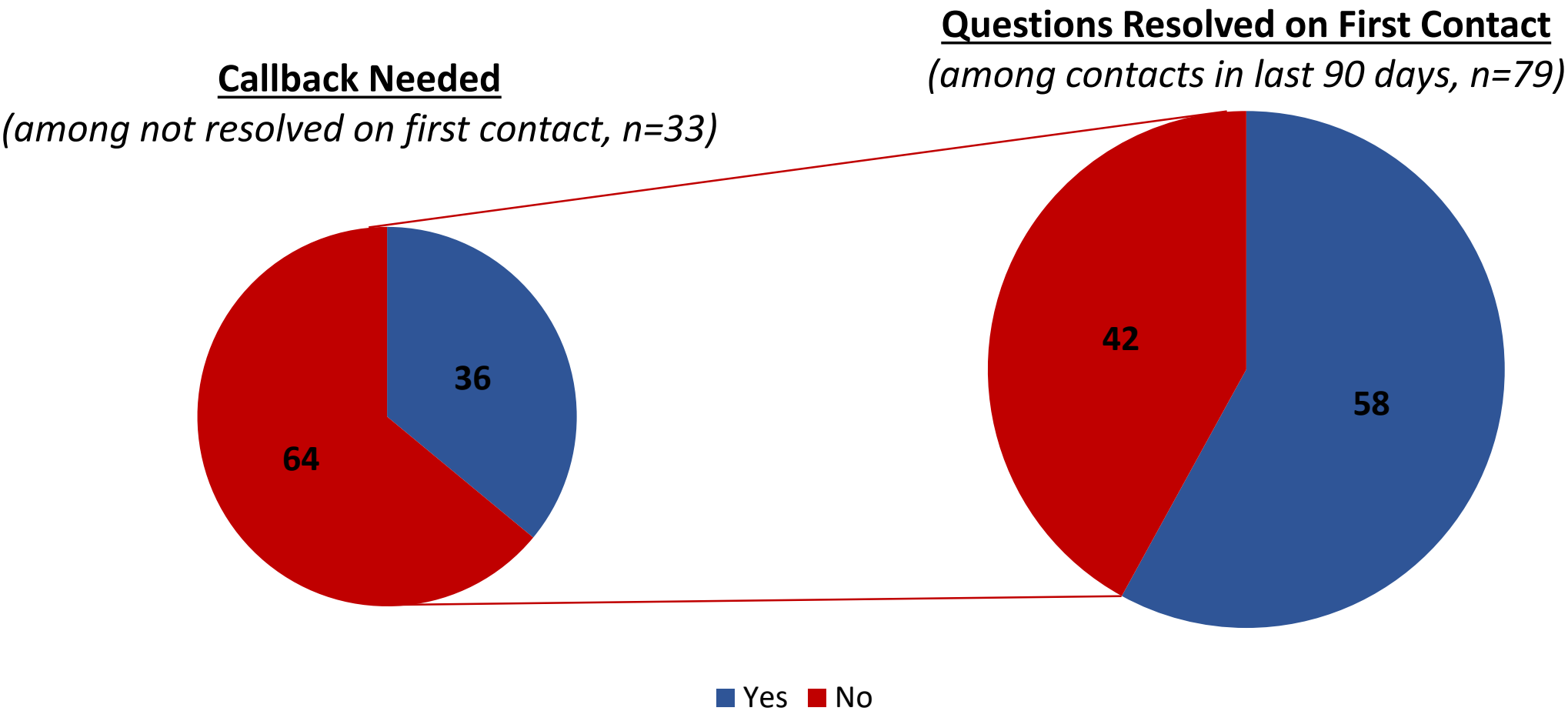
Method of Contact

(among contacts in last 90 days, n=79)



ONLY THREE FIFTHS OF CUSTOMERS HAD THEIR ISSUE RESOLVED ON FIRST CONTACT

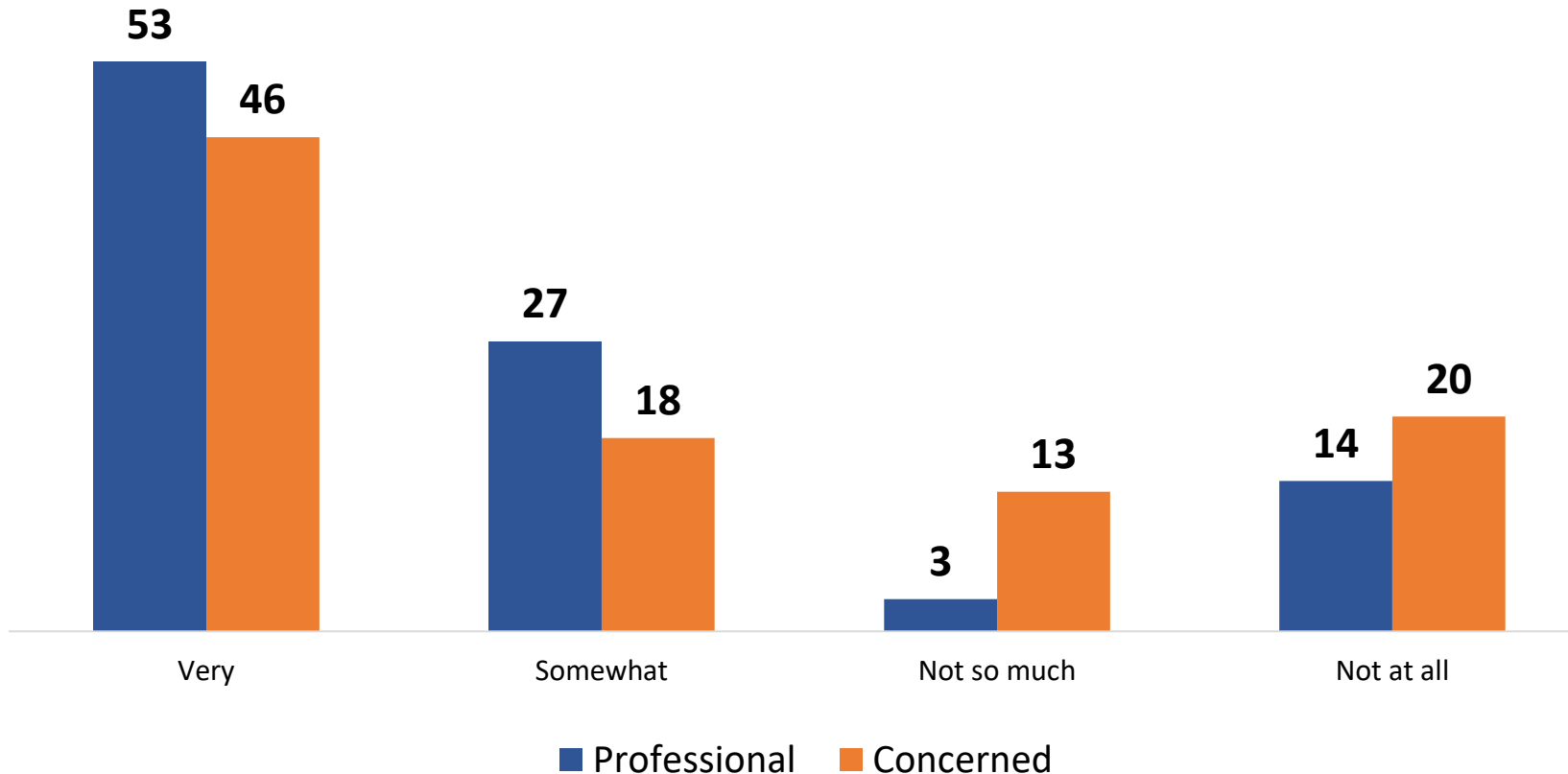
Among customers who contacted DWSD with an issue in the last 90 days, only 3 in 5 said their issues were resolved on first contact. Of those that said their issue was not resolved one third required a callback.



CUSTOMERS FEEL THAT DWSD REPRESENTATIVES ARE PROFESSIONAL AND CONCERNED

4 of 5 customers who contacted DWSD in the last 90 days feel that the representative they spoke with was professional and 2 of 3 feel they were concerned with resolving the issue. There is a slightly higher sentiment of professionalism than there is of concern.

Concern and Professionalism *(among contacts in last 90 days, n=79)*



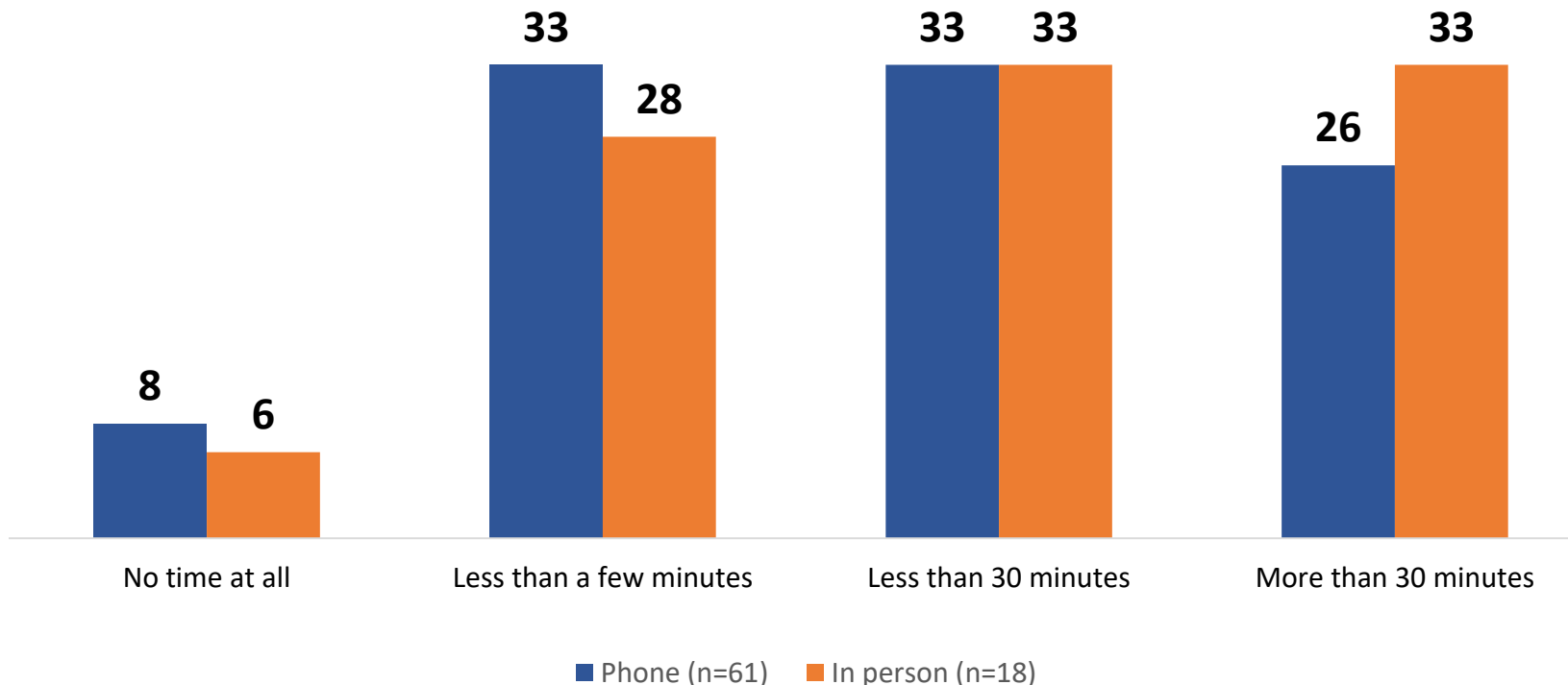
Q13: How professional would you say the representative you dealt with was?
Q14: And how concerned would you say the representative was with resolving your issue?

WAIT TIMES ARE HIGH FOR BOTH IN PERSON AND PHONE

Both in person and over the phone, one third of customers waited up to a half hour to speak with a representative. Another third of in person contacts and quarter of over the phone contacts waited over a half hour.

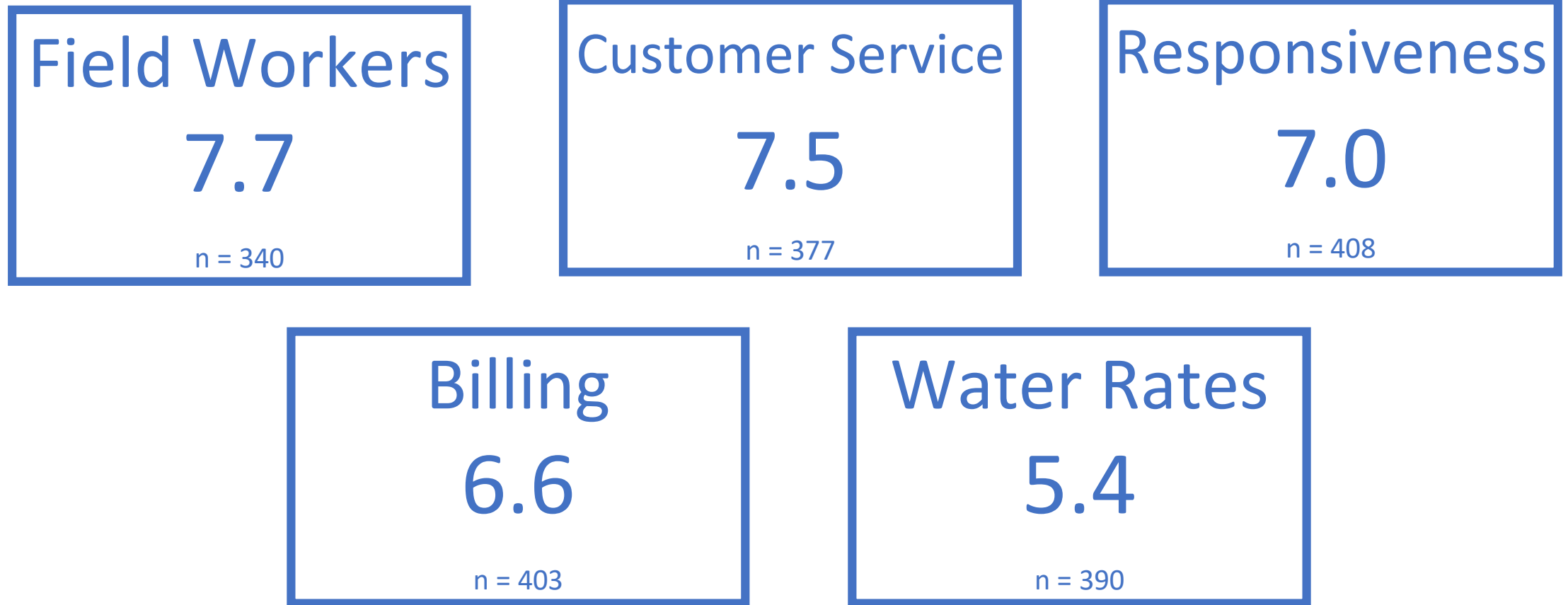
Wait Time to Speak with a Representative

(among contacts in last 90 days , n=79)



FIELD WORKERS SCORE BEST AMONG ASPECTS OF DWSD SERVICE

Customer service is a close second. DWSD scores lowest on water rates, where it still receives a middling score.

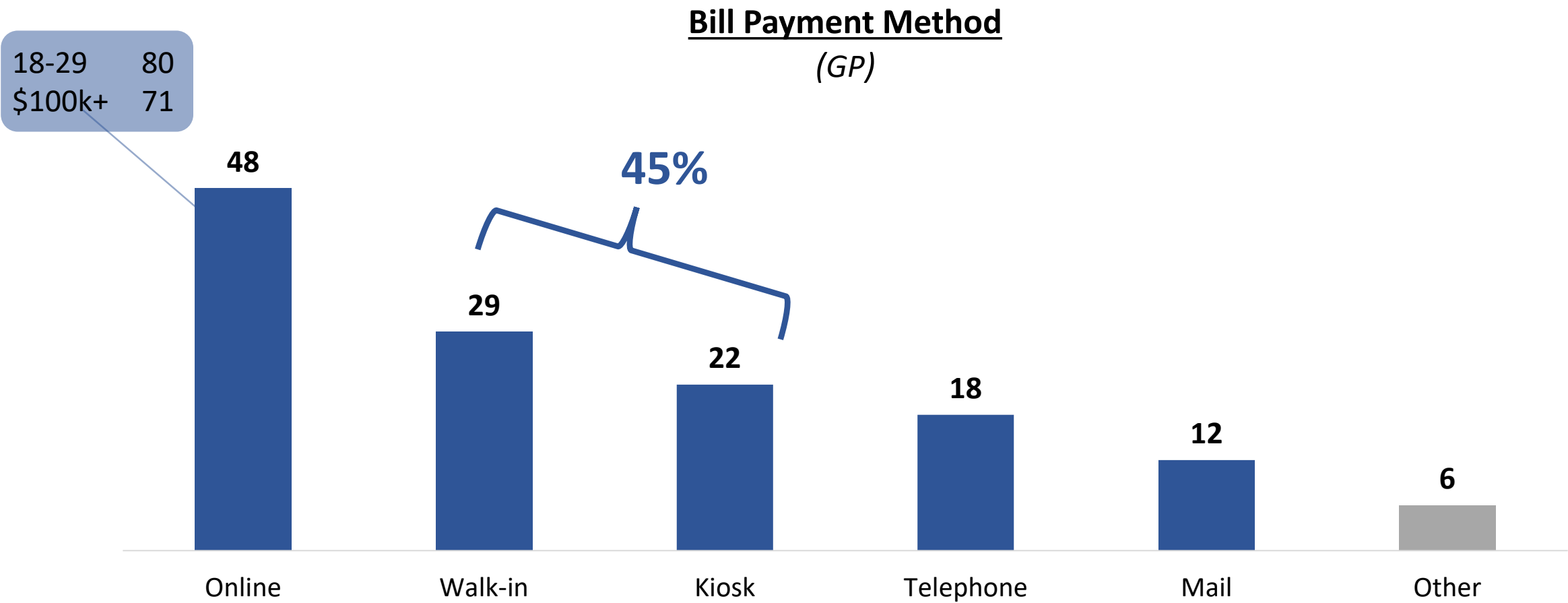


An aerial photograph of a city at dusk. The foreground shows a residential neighborhood with brick houses, green trees, and a street with a few cars. In the middle ground, a large, white, domed stadium is visible on the left. The background is dominated by a dense skyline of skyscrapers, many of which are illuminated with warm lights. The sky is a mix of orange and grey. The word "BILLING" is written in large, white, sans-serif capital letters across the center of the image, with a thin white vertical line to its left.

BILLING

ONLINE AND IN PERSON ARE EQUALLY POPULAR BILL PAYMENT METHODS

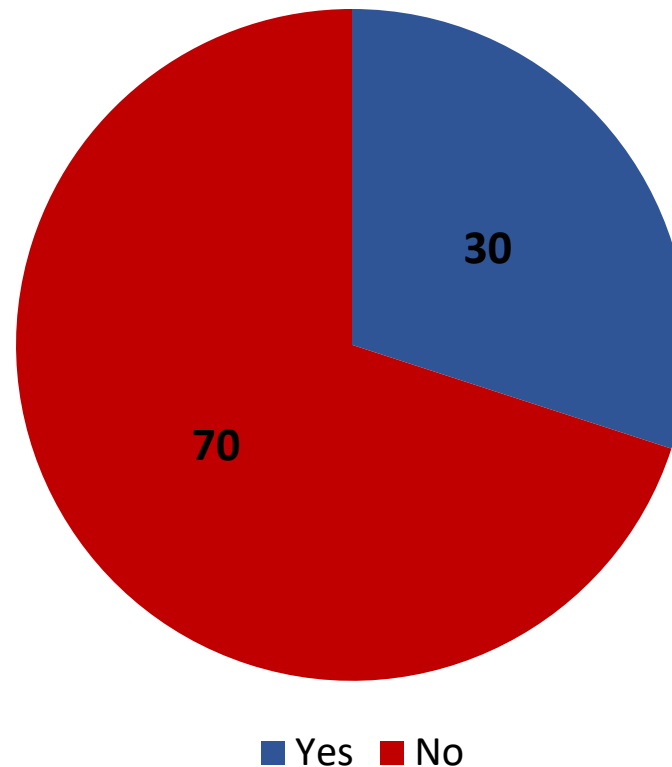
Online is by far the most popular payment method among younger and higher income customers.



3 OF 10 CUSTOMERS SAY THEY HAVE HAD TROUBLE PAYING THEIR WATER BILL

Having listened to the recordings to the answers to this question, it is apparent that often respondents answered yes to this question as a result of having trouble actually paying the bill online or in person. Further, respondents answered yes if they had issues paying at any point in the past. In the future, we would recommend rephrasing to specify financial trouble and to limit to the past couple of years.

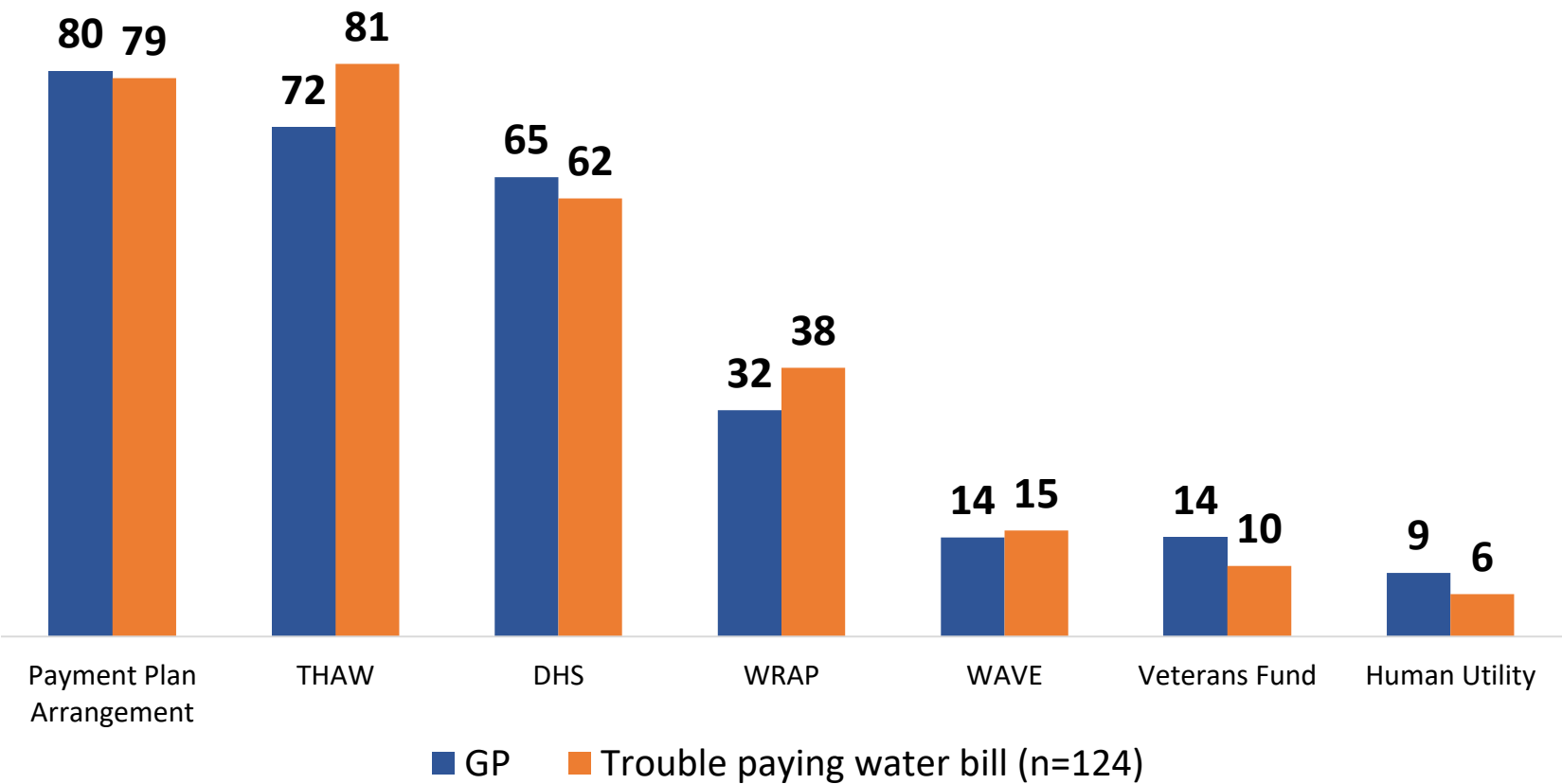
Trouble Paying Water Bill
(GP)



THERE IS HIGH AWARENESS OF PAYMENT PLANS AND THAW

THAW is especially familiar to customers who have had trouble paying their water bill. Other programs prove very unfamiliar and could warrant greater exposure.

Familiar with Program

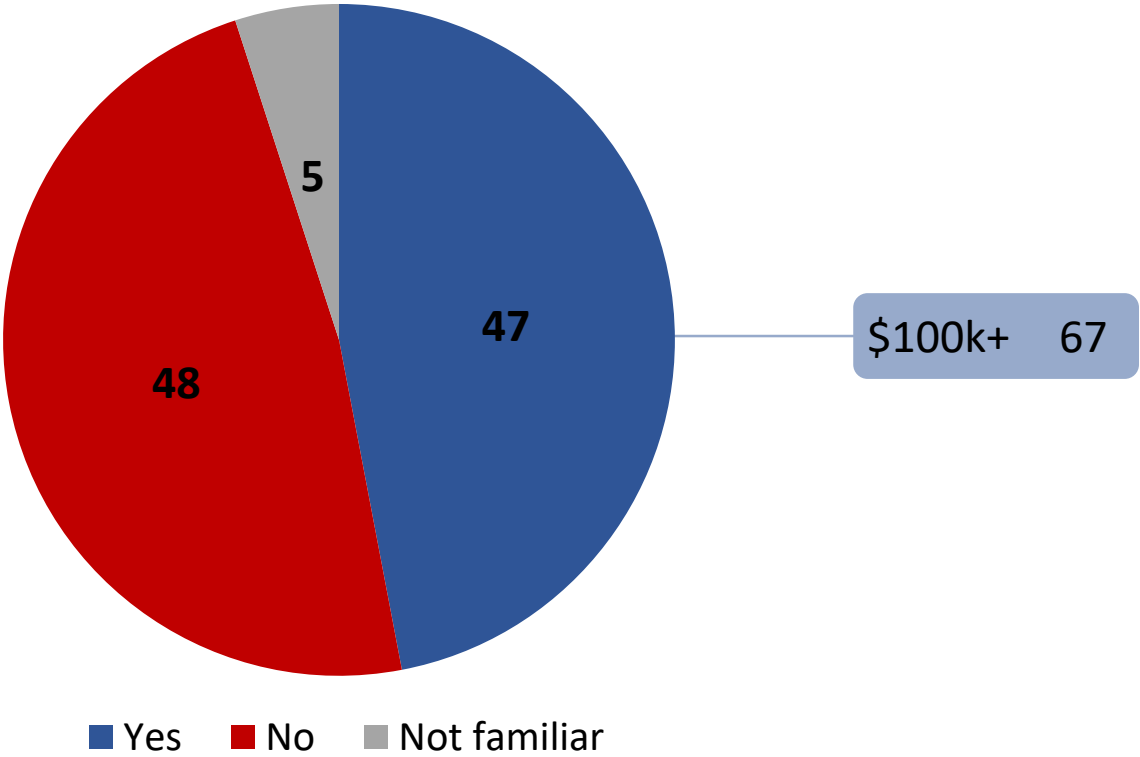


Q21: Please indicate whether or not you have heard of the program.

ONLY ABOUT HALF OF CUSTOMER UNDERSTAND THE DRAINAGE CHARGE

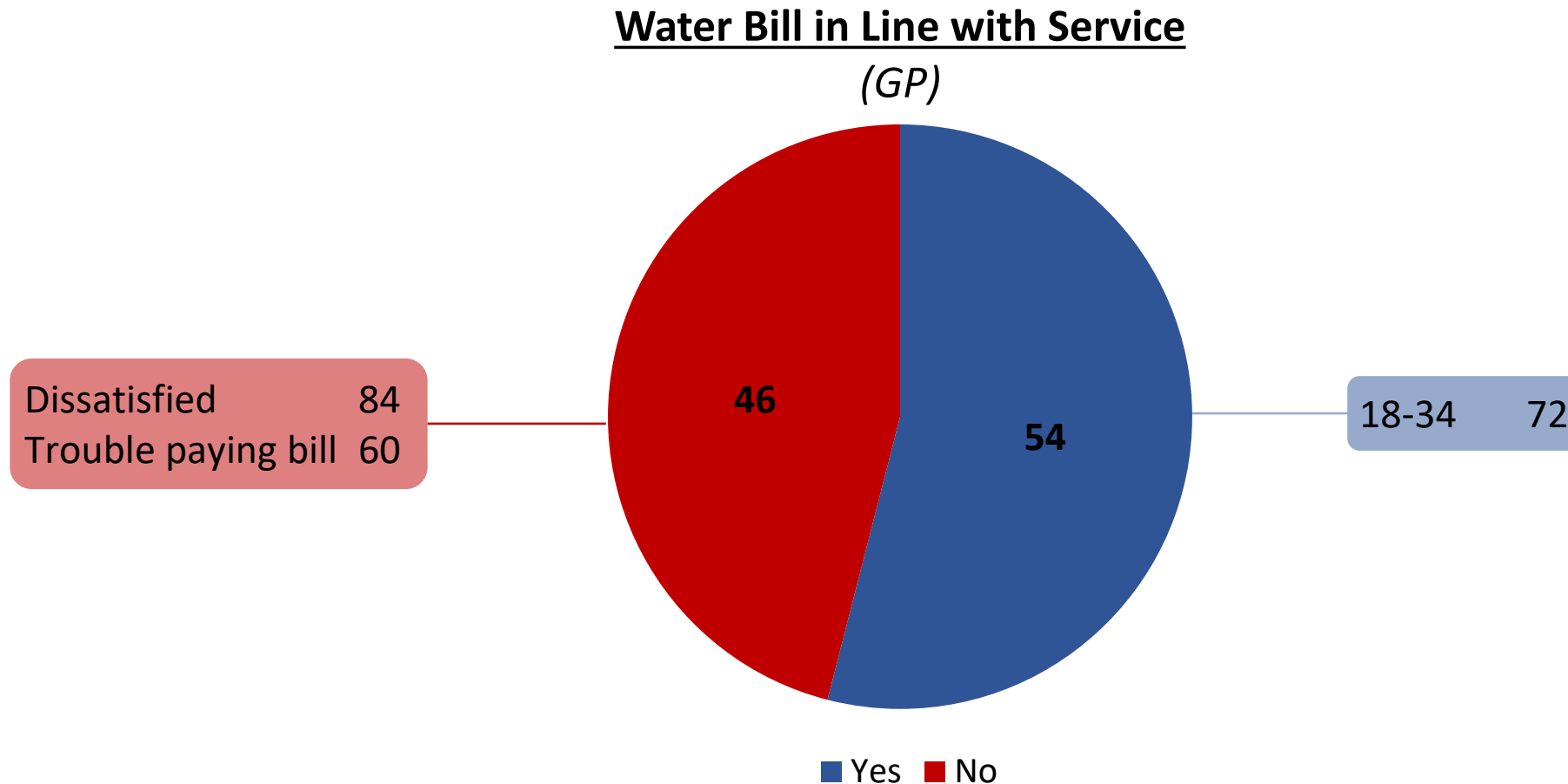
Unsurprisingly, two thirds of higher income customers are familiar with the charge.

Understand Drainage Charge
(GP)



JUST OVER HALF BELIEVE THEIR BILL IS IN LINE WITH SERVICE

Dissatisfied customers and customers who have trouble paying their water bill tend to not believe the service is in line with the bill. Younger customers tend to especially believe that the service warrants the bill they receiving.

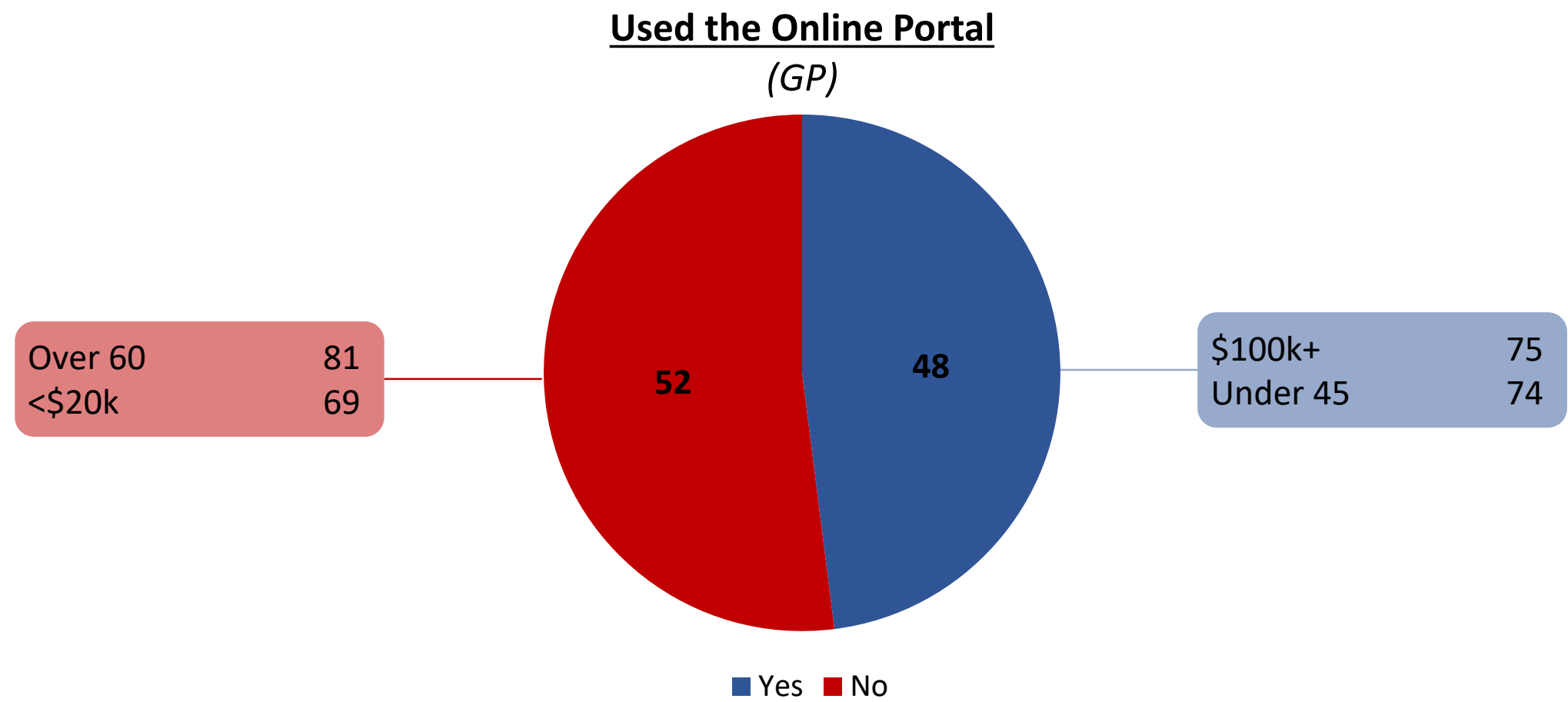


An aerial photograph of a city at dusk. In the foreground, there are several rows of residential houses with dark roofs and some trees. In the background, a dense city skyline is visible, featuring various skyscrapers and buildings, some of which are illuminated. The sky is a mix of orange and grey. The text 'ONLINE PORTAL' is overlaid in the center in a white, sans-serif font. A thin white vertical line is positioned to the left of the text.

ONLINE PORTAL

HALF OF ALL CUSTOMERS HAVE USED THE ONLINE PORTAL

That number is particularly higher among higher income customers and 45+ customers, where it grows to 3 out of 4 customers.

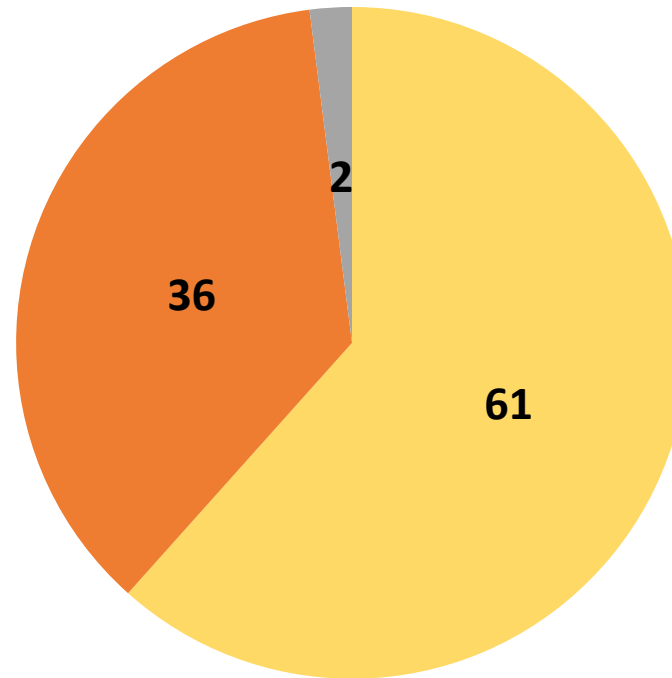


Q26: Have you used DWSD’s online portal?

MOST OF ONLINE PORTAL USERS ARE REGISTERED USERS

Just over a third of online portal users simply use the guest pay feature without registering.

Registered User vs. Guest Pay
(among used online portal, n=203)

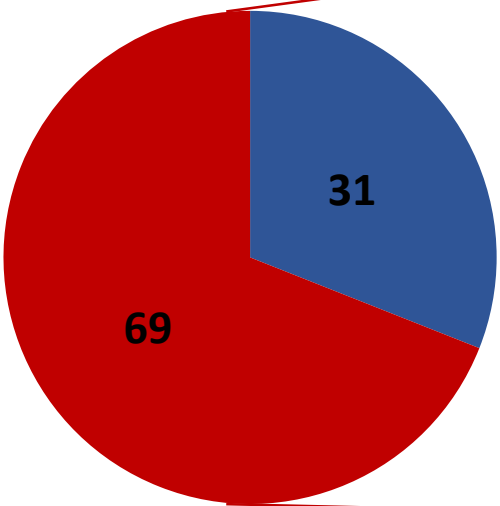


■ Registered user ■ Guest pay ■ Don't know

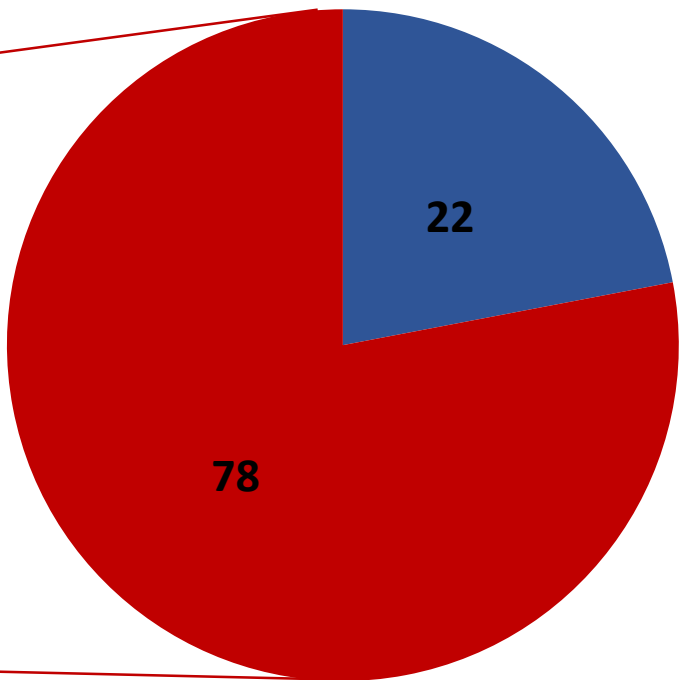
ONLY ABOUT A FIFTH OF ONLINE USERS ARE ENROLLED IN A PAYMENT PLAN

Of the 78% that are not, 70% did not even realize this was an option. This could be an opportunity to highlight the option more on the portal.

Aware This Was an Option
(among not enrolled, n=158)



Enrolled in Online Payment Plan
(among used online portal, n=203)

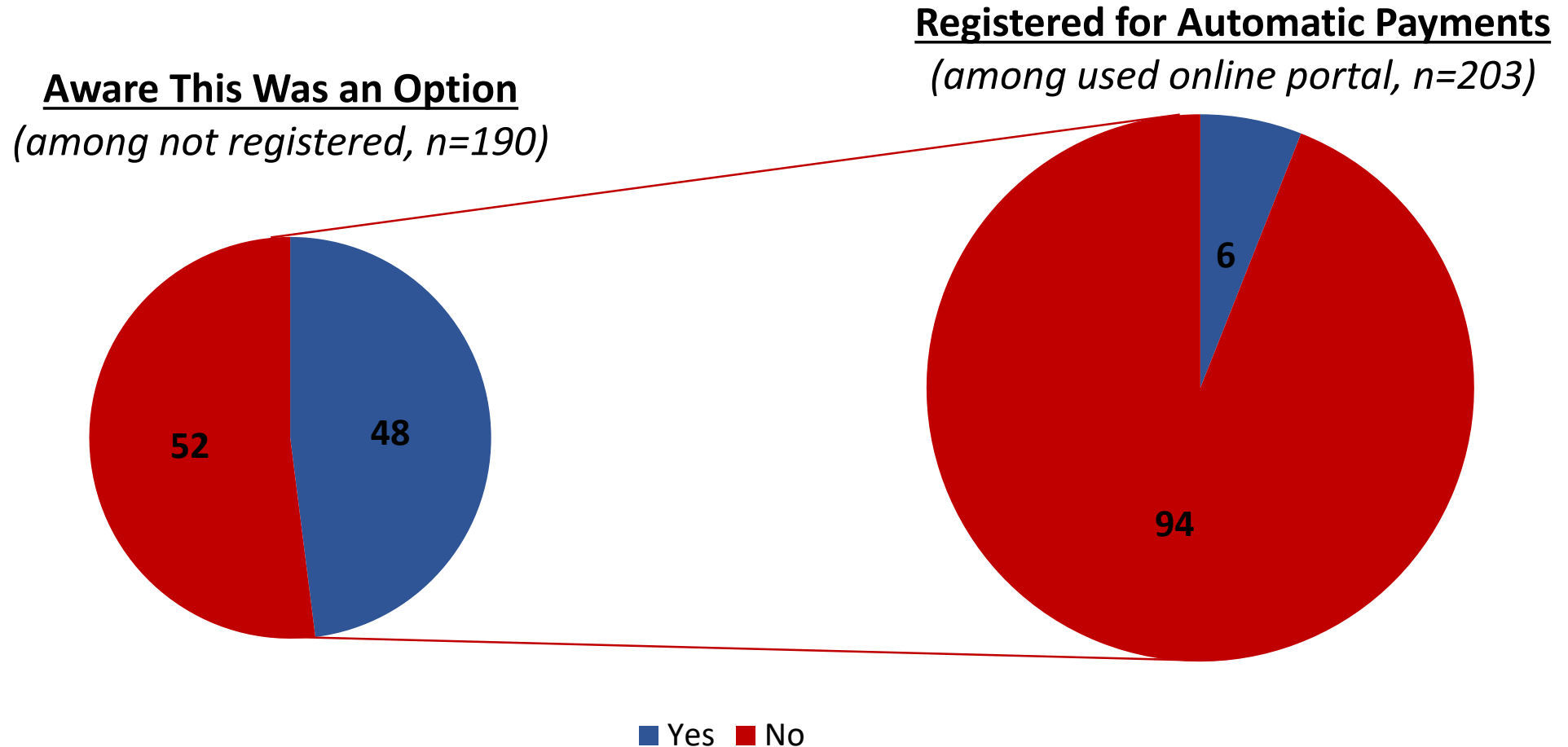


■ Yes ■ No

Q29: Have you created a Payment Plan Arrangement using the portal?
Q30: Were you aware that this was an option?

A VERY SMALL NUMBER OF CUSTOMERS CHOOSE TO ENROLL IN AUTO PAY

Of those that don't, half are aware of this being an option, indicating that they are proactively choosing not to enroll.



Q31: Are you currently registered for automatic payments on the portal?

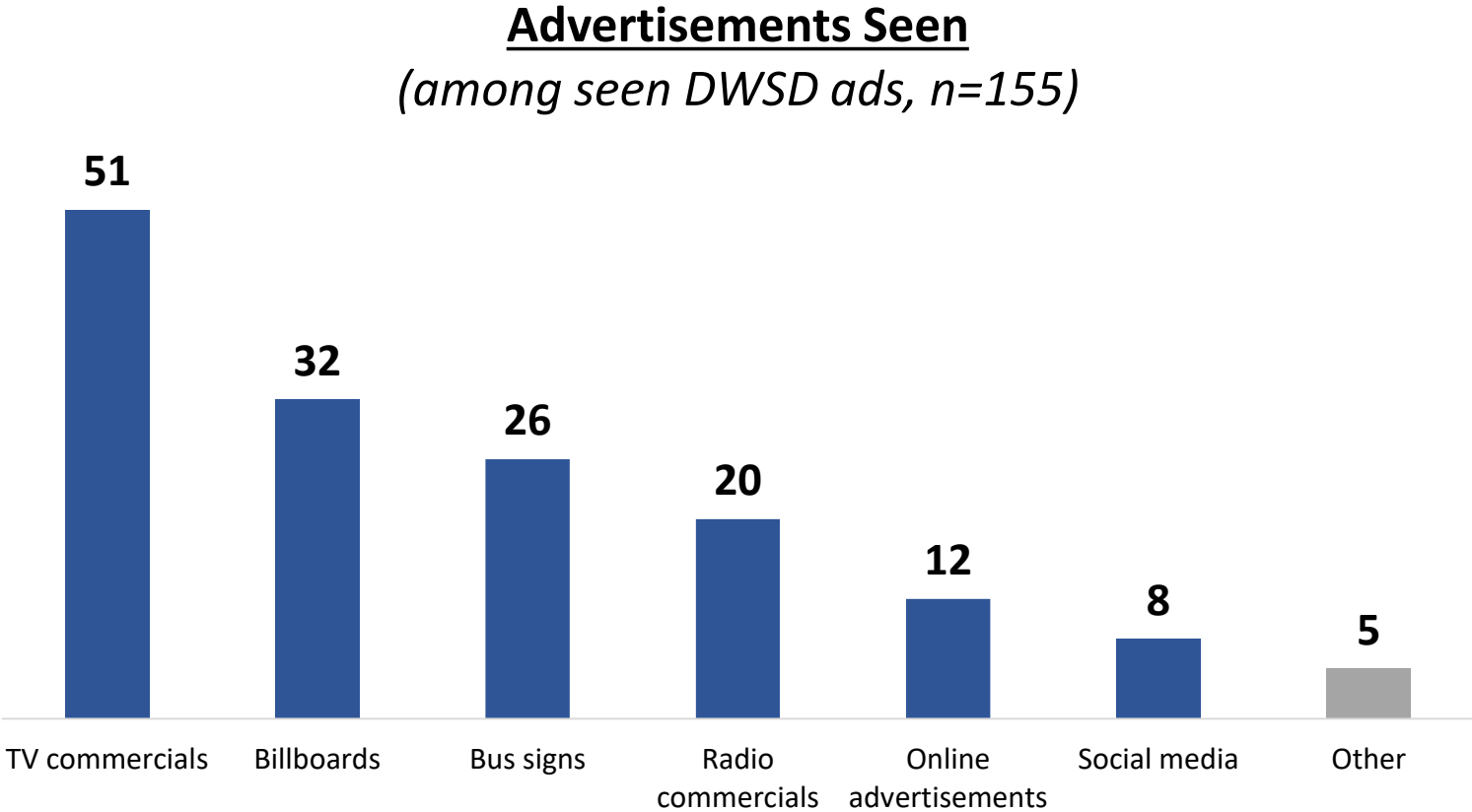
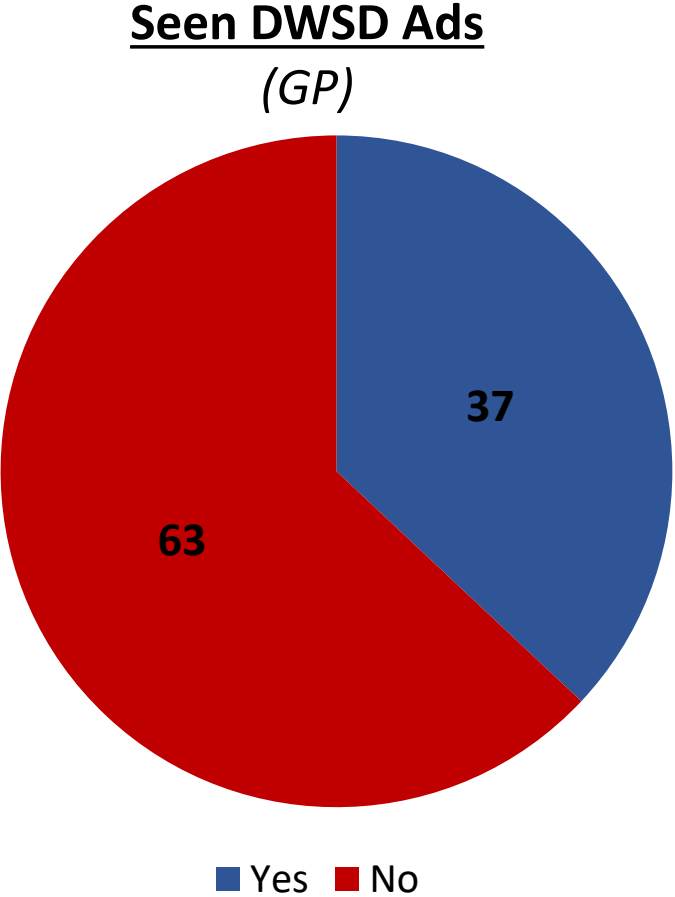
Q32: Were you aware that this was an option?

An aerial photograph of a city at dusk. In the foreground, there are residential houses with dark roofs and some trees. In the middle ground, a large, white, dome-shaped stadium is visible. In the background, a dense city skyline with various skyscrapers is silhouetted against a warm, orange-hued sky. The word "ADVERTISING" is written in large, white, sans-serif capital letters across the center of the image. A thin white vertical line is positioned to the left of the text.

ADVERTISING

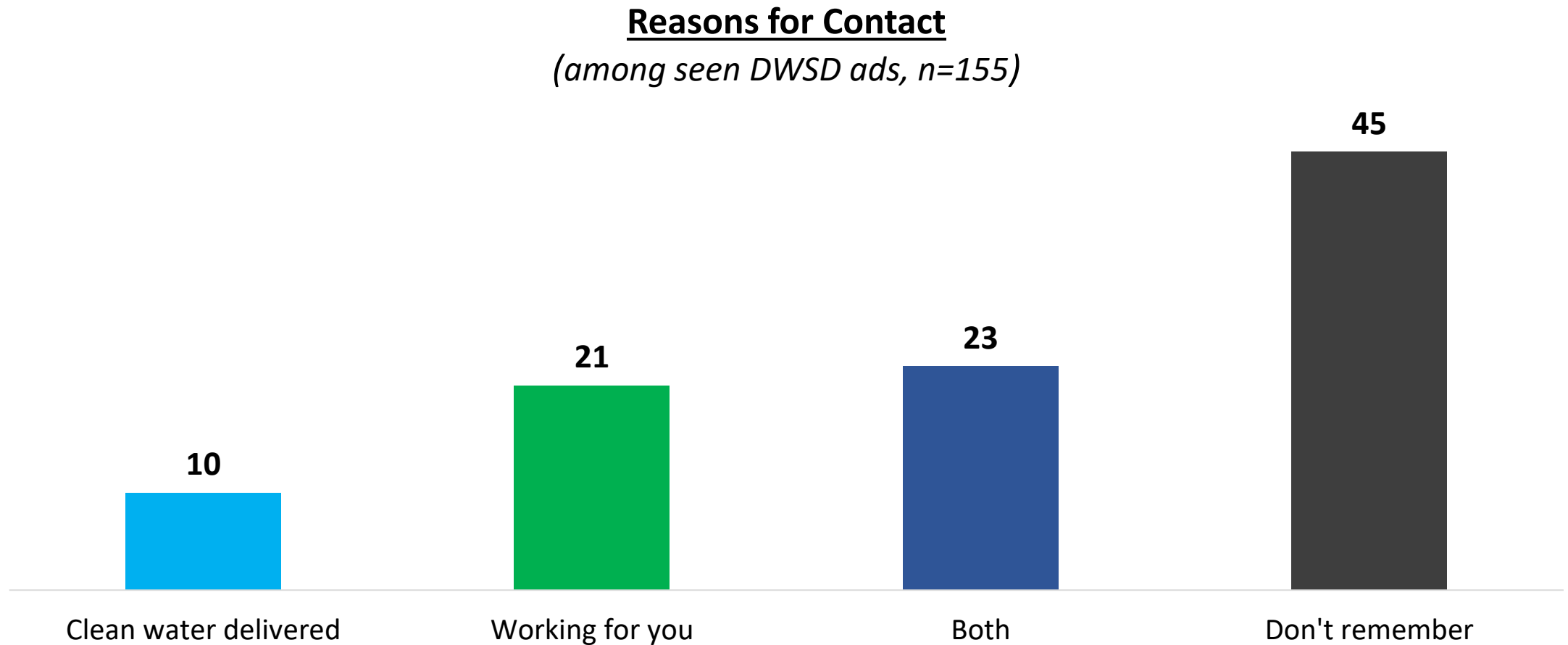
ONLY A THIRD OF CUSTOMERS HAVE SEEN DWSD ADVERTISEMENTS

Among those who have seen advertisements, TV commercials were by far the most common.



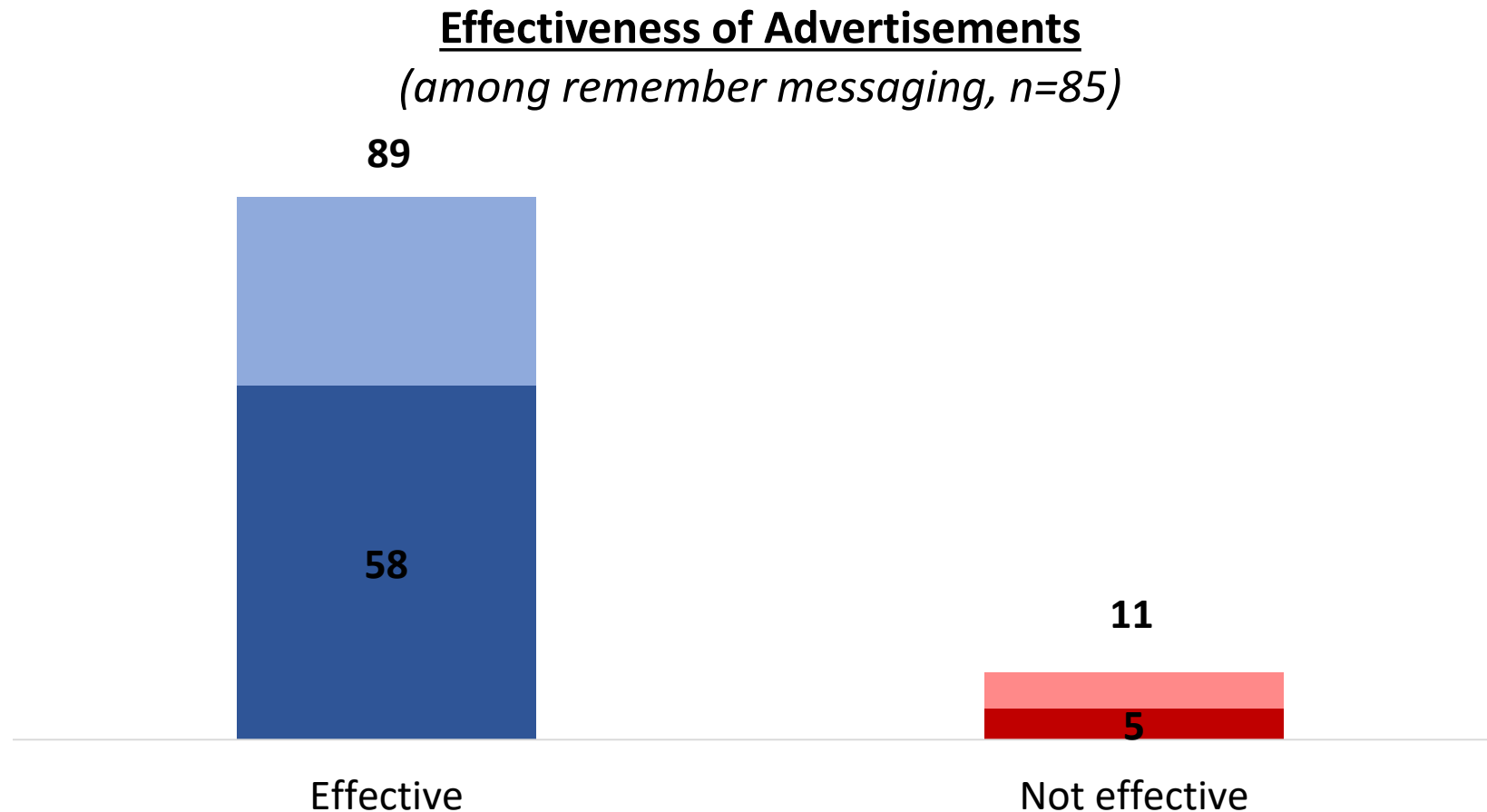
DWSD MESSAGING IS NOT STICKING AMONG CUSTOMERS

Nearly half of customers who saw DWSD ads do not remember the messaging they saw. “Working for you” was recalled twice as much as “Clean water delivered”.



9 OF 10 CUSTOMERS WHO REMEMBER DWSD MESSAGING THINK IT WAS EFFECTIVE

Furthermore, 6 of 10 thought it was *very* effective. This is unsurprising considering we are only looking at the segment of the population that has seen the advertising *and* remembers the messaging on it.



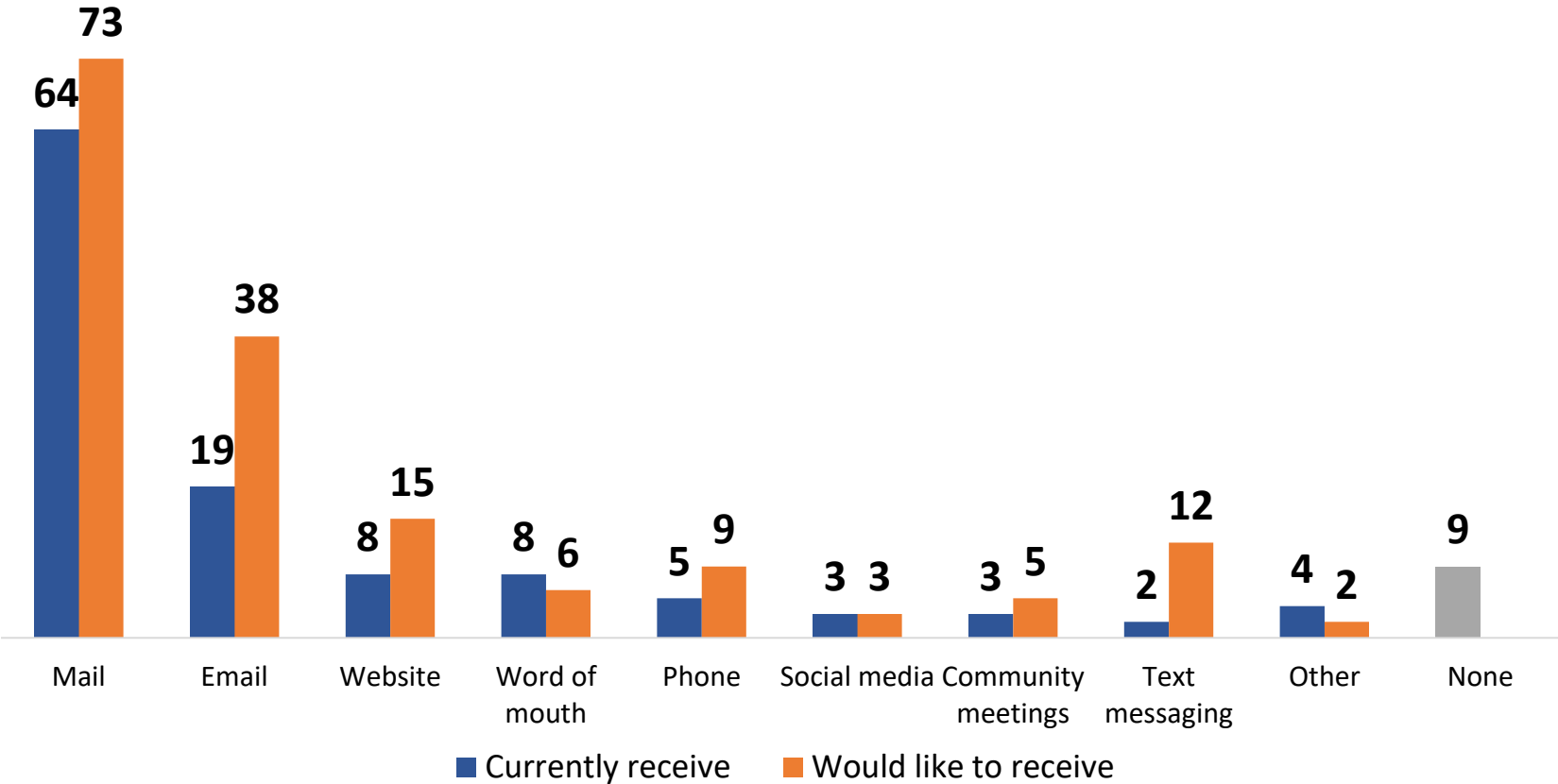
An aerial photograph of a city at dusk. In the foreground, there are residential houses with dark roofs and some trees. In the middle ground, a large, white, dome-shaped stadium is visible. In the background, a dense city skyline with various skyscrapers is silhouetted against a warm, orange-hued sky. The word "OUTREACH" is written in large, white, sans-serif capital letters across the center of the image. A thin white vertical line is positioned to the left of the text.

OUTREACH

THE MAJORITY GET DWSD INFO BY MAIL AND WANT IT TO STAY THAT WAY

There is a noticeable disparity between customers who receive information through DWSD’s email or website and those who wish to. This is an opportunity to consider focusing more on digital communications.

Getting Information
(GP)



Q37: How do you currently get information about DWSD?

Q38: And how would you like to receive information about DWSD in the future?

An aerial photograph of a city at dusk. In the foreground, there are several rows of residential houses with dark roofs and some trees. In the background, a dense city skyline is visible, featuring several tall skyscrapers. The sky is a mix of orange and grey, indicating sunset or sunrise. The word "APPENDIX" is written in large, white, sans-serif capital letters across the center of the image. A thin white vertical line is positioned to the left of the text.

APPENDIX

THERE IS GENERAL CONSENSUS ON FIELD WORKERS AND CUSTOMER SERVICE SCORE

DWSD’s water rate score tends to be more stratified among its customers.

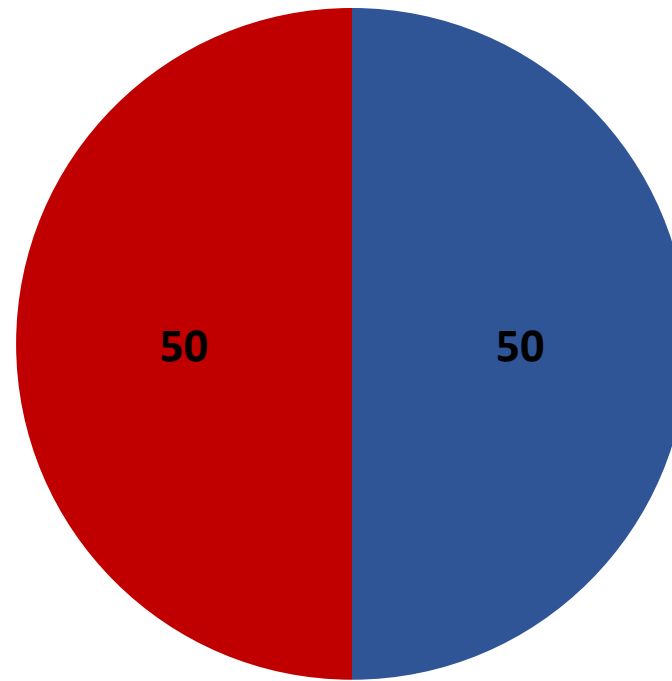


Q18: How would you rate DWSD’s performance on a scale from 1 to 10?

ONLY ABOUT HALF OF CUSTOMERS WHO REQUIRED A CALL BACK RECEIVED ONE

This was a particularly off-putting point to customers we spoke to.

Calls Returned
(among required a callback, n=12)

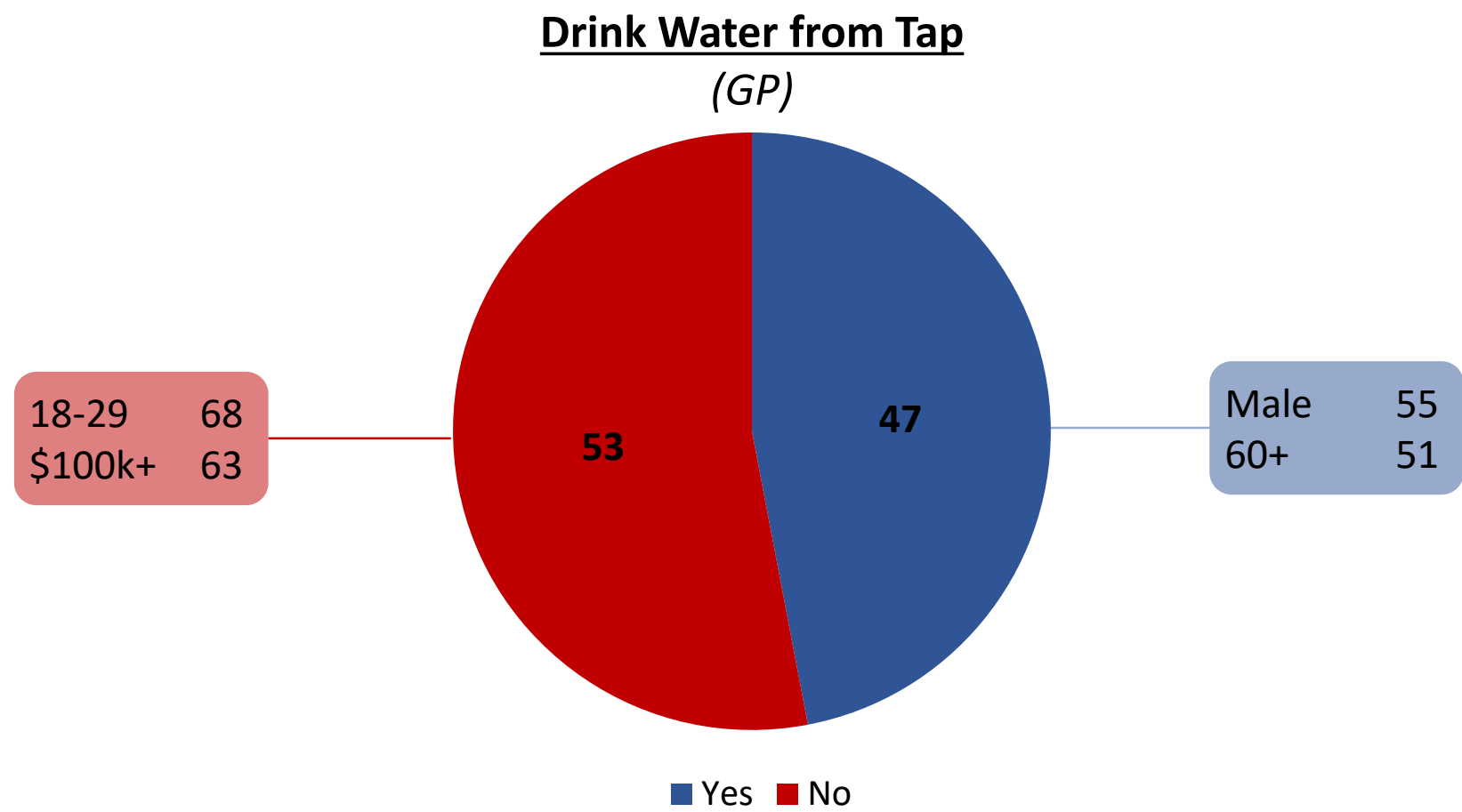


■ Yes ■ No

Q12: And did they return the call as promised?

LESS THAN HALF OF CUSTOMERS DRINK WATER DIRECTLY FROM THE TAP

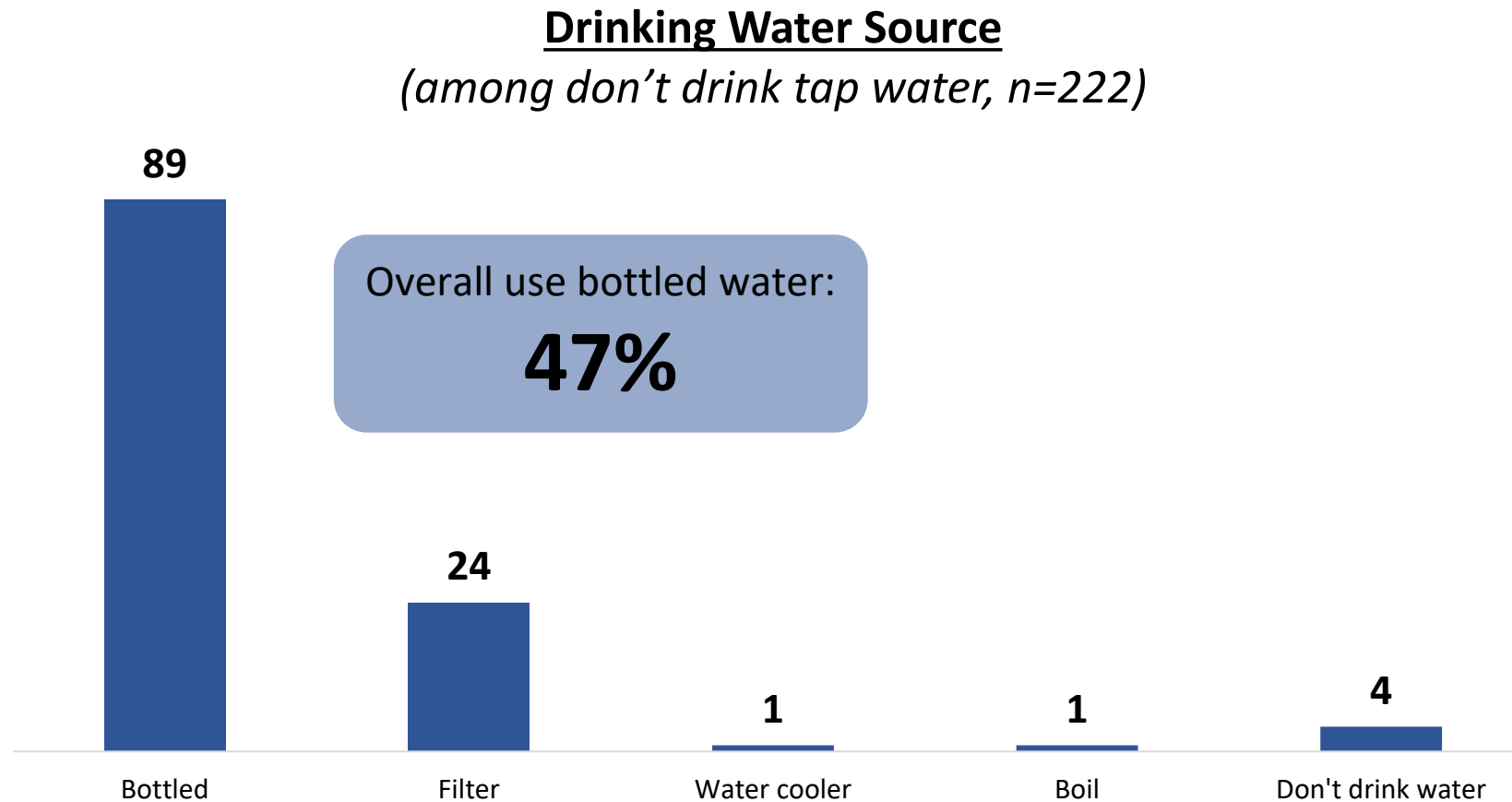
Two thirds of younger and higher income customers do not drink water directly from the tap.



Q24: Do you drink the water directly from your tap?

9 OF 10 WHO DON'T DRINK TAP WATER USE BOTTLED WATER

Nearly half of all customers uses bottled water over tap water. A quarter of customers who don't drink tap water directly run it through a filter first.



An aerial photograph of a city at dusk. In the foreground, there are several rows of residential houses with dark roofs and some trees. In the background, a dense city skyline is visible, featuring various skyscrapers and buildings, some of which are illuminated. The sky is a mix of orange and grey. The word "DEMOGRAPHICS" is written in large, white, sans-serif capital letters across the center of the image. A thin white vertical line is positioned to the left of the text.

DEMOGRAPHICS

Gender

Male	27
Female	73

Age

18-29	6
30-44	31
45-59	27
60+	34
Prefer not to say	4

People in Household

1	31
2	26
3	21
4	10
5	6
6	2
7	0
8+	3

Children in Household

0	63
1	14
2	14
3	4
4	3
5	1
6+	0

Household Income

< \$20,000	34
\$20,000 - \$49,999	31
\$50,000 - \$99,999	17
\$100,000 - \$249,999	5
> \$250,000	1
Prefer not to say	12

Relationship to Property

Owner	74
Renter	24
Property manager	1
Other	1